



Memorandum

To: Anne Teresa, SFA

From: Howard Weitzner, Accenture

Date: January 31, 2002

Subject: Deliverable 29.4.1d Training Services Summary

Purpose

This memo summarizes the results of Training Services provided to SFA University during the period January 1 – January 31, 2002. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

Initiatives this Period

Specific initiatives addressed during this period included:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning Consultant role definition and development
- Needs assessment
- Effective teams
- eProject
- Corporate University conference
- Project management

Planned Initiatives

During the period February 1 – February 28, 2002, the following initiatives may be addressed, but not limited to:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Development of Learning Consultant role
- Needs assessment
- Effective teams
- Corporate University conference
- Project Management
- Manager development and performance support assistance

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Description of Initiatives

SFA University strategic planning and organization development

Underlying other initiatives in this area is ongoing support for SFA University's efforts to develop and enhance its organization. Activities continue to focus on aligning SFA University's with the strategic goals of the organization. For example, support is ongoing for partnering with the TDC as well as action team support to help each team complete major segments of work.

Training development and delivery methodology/process team

The Training Development and Delivery team supports the creation and implementation of best practices for how SFA University develops and delivers training. The methodology (Plan, Design, Build, Do, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team met for final review of the Plan phase materials. The Plan materials were originally tested with the Spring 'Tools' Training in October, revised based upon their recommendations, and piloted with the Pell Training team in January. The Pell Training team kick-off meeting was organized and facilitated by the Process team. During the 2-day workshop, the team completed all major deliverables of the Plan phase, utilizing the standard templates and job aids. Feedback was gathered to adjust the process appropriately.

Specific activities during this period included:

- Training Development and Delivery Process overview presentation to external partners
- Refinement of materials for the Plan phase
- Pilot of the Plan phase materials by the Pell Training team
- Facilitation of the Pell Training kick-off meeting
- Continued support of the Spring Training team
- Development and refinement of materials for the Design phase

The next phases of work may include:

- Completion of the Design phase deliverables
- Initial development of the Build phase approach and materials
- Support of Spring Training / COD team during course design process
- Support of the Pell Training team during course design process
- Support of Summer Training team during the course planning and design processes
- Initial development of materials for introducing the process to training teams

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Delivery cost assessment

An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need was identified to conduct a delivery cost assessment of which courses to target for cost reduction.

In the beginning of January, the Cost Analysis Tool was presented to the team. A fictional scenario was used to demonstrate how the model works and validate the formulas. The team has been revising cost drivers, modifying the look and feel of the tool, and generating ideas for cross-course cost comparisons. Additionally, the team will continue to identify and develop the communication and materials necessary to support the deployment of the cost analysis model.

Activities during this period included:

- Review and revisions of the tool
- Formula validation
- Customization and modification of the cost analysis model
- Development of reporting and analysis procedures
- Selection of the pilot course for analysis

Specific activities in the next period will include:

- Continued development and customization of the cost analysis model
- Identification and development of communications required to deploy the cost analysis model
- Detailed research of one course's costs and identification of related processes and tools
- Pilot the Fiscal Management Training (FMT) for analysis

Learning Consultant Role Development

During this period, the learning consultant role was further defined and developed. The learning consultant serves as the link between SFA University and other areas within SFA. By leveraging the work of the needs assessment team, the learning consultant will identify solutions to enhance team performance. The learning consultant model was presented to SFAU management who provided feedback and direction for further development.

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Needs Assessment

In cooperation with the Learning Consultant development, the needs assessment project has continued to define its scope, determine methods of measuring needs, and identify corresponding business goals. Specific activities include:

- Gathering ideas on tool/process/approach for needs assessment
- Researching existing needs assessment tools/approaches
- Identifying industry data as reference

Effective Teams

The "Effective Teams" initiative identified four team leads to receive one-on-one coaching on facilitating meetings and project planning. The team developed strategies for communicating and implementing the tools across SFA U. To aid this initiative, an SFA U champion for the initiative was identified and trained on the processes. Specific activities this period included:

- Created communication and marketing plan
- Developed a series of meeting templates to be introduced to SFA U over the next month
- Planned a training orientation session for all Team Leads that are receiving one-on-one coaching
- Provided coaching to team leads on building agendas and determining how the track team milestones
- Surveyed team members to determine baseline for future progress
- Planned Facilitation Leadership course to be conducted by Interaction Associates at the end of February

eProject

The Training Process and LMS teams are piloting the use of eProject, a web-based project management and team collaboration site. Using this tool through Mod Partner, team members can access project information, share documents, and collaborate on project status. It also allows for version control, which automatically archives previous document versions.

During this period, the Training Process team has used the document sharing functionality to work from dispersed locations. The Pell team will be the first training team to pilot eProject. Additionally, the tool is being reviewed for wider use within SFA, such as for its calendar functionality.

Activities during this period included:

- Demonstration of eProject to Training Process team
- Distribution of eProject job aid throughout SFA U.

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- eProject pilot with Pell training team

Specific activities in the next period may include:

- Review the need for eProject use across SFA University
- Further define the needs for eProject access for additional training teams, allowing virtual work and document sharing

Corporate University Conference

A custom developed workshop on Corporate Universities is being planned for delivery to a select group of SFA University managers and staff on March 12 - 13 at the Accenture training facility in St. Charles, IL. The purpose of this conference is to identify, present and apply industry best practices to SFA University. The conference will focus on the following topics:

- Overview of Accenture Corporate University
- Leadership Development
- Curriculum Planning
- Communications and Marketing

Project Management

Project management support continues to be provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage. Future activities may include meeting and workgroup facilitation.

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Observations/Recommendations

During the period January 1 – January 31, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- Training process team could meet with team leads to inform them about the new process prior to sharing it with individual teams. This enhances the team lead's understanding of the process and its corresponding job aids and templates, therefore increasing their support for the tools. Similarly, the team could prepare area experts to support the presentation of the process, thereby strengthening its support within SFA University and, more generally, increasing awareness regarding its component parts.
- As additional training teams are created, eProject could enhance their collaborative work efforts despite distance or different work environments.
- Cost analysis and training process teams would benefit from the input of experts in specific areas such as communications and logistics. Identifying liaisons between these groups would encourage information sharing and consistency among teams.
- It would be beneficial to integrate related services such as learning consultant, needs assessment, cost analysis, training process, management development to define an integrated strategy for competency development across the organization.

Attachments:

- Training Process Team materials
 - Updated Gantt chart
 - Training Development & Delivery Process presentation
 - Pell kick-off workshop presentation
 - Pell workshop agendas
 - Updated Plan materials
- Cost Analysis materials
 - Cost analysis tool
 - Scenario used for demonstration/explanation (participant and facilitator version)
- Learning Consultant
 - Learning Consultant overview presentation
- Effective Teams
 - Effective Teams workplan
 - Meeting checklist
 - Agenda template
 - Outcome summary template
 - Survey
 - Team lead goal sheet
- eProject
 - eProject job aid
- Corporate University conference
 - SFA U visit to Accenture Corporate University agenda